

# Supporting



## What are the benefits of giving stock directly to charity?

- Giving stocks or securities is as easy as 1,2,3.
  - Gifts of stocks and securities to charities are an attractive option because:  
**Winning stocks:** You do not pay capital gains tax on appreciated stocks or securities if they are donated directly to a registered charity. Any excess tax credit can be carried forward five years.  
**Losing stocks:** Consider triggering a capital loss and donating the cash proceeds to Institute for Advanced Judaic Studies. Not only will you receive a donation credit, but the capital loss on the securities can be used to offset capital gains in the current year or be carried back three years or carried forward indefinitely to offset any capital gains and thus reduce your income taxes.
  - You will receive a tax receipt for the full, fair market value of the shares, but you will not be taxed on any gain.
  - You can claim charitable donations up to 75% of your net income.
  - Your gift comes from your assets, not your income.
  - Donations can also be used to reduce tax liability when unexpected taxable events occur.
  - Using charitable donations as a tax planning vehicle benefits both you and the charity.
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## SECURITIES TRANSFER AUTHORIZATION

Thank you for considering a gift of securities to Institute for Advanced Judaic Studies. In order for stocks to be legally transferred and accepted by Institute for Advanced Judaic Studies and our brokerage firm, a completed and signed copy of this form must be forwarded to the contacts listed below. Just follow the 3 easy steps.

**Step #1: Complete and sign the form below**

<b>GIFT INFORMATION</b>	
Donor Name:	
Address:	
City:	Province:          Postal Code:
Home Phone:	Business Phone:
Email:	
Name of Securities Transferred	
Number of Shares	
Approximate Value (\$):	Date of transfer
<small>We are pleased to issue a charitable tax receipt for your contribution based on the market value of the transferred securities determined at the close of trading on day National Bank Financial receives the securities.</small>	
Signature of Donor:	Date:

**Step #2: Contact Our Broker**

Have your broker contact David Lakin at Friedberg Mercantile (see contact information below) to advise of the pending transaction. Your broker will be required to forward this signed form to initiate the process.

**Step #3: Contact Institute for Advanced Judaic Studies (Kollel Toronto)**

Advise the Institute for Advanced Judaic Studies of the pending transfer by forwarding a copy of this form to the contact below. A copy of this completed and signed form is required to ensure timely processing of your gift and to issue a charitable tax receipt.

NATIONAL BANK FINANCIAL  
CUID: NBCS (Canadian)  
DTC: 5008 (US)  
ACCOUNT: 2L-0570-E (CAN)  
          or 2L-0570-F (US)  
CONTACT: David Lakin  
          Friedberg Mercantile  
          416.350.2902  
          dlakin@friedberg.ca

Institute for Advanced Judaic Studies  
Albert Engel  
Executive Vice President  
Phone: 416.789.1853  
Fax: 416.785.8343  
email: kolleltoronto@rogers.com

Institute for Advanced Judaic Studies (Kollel Toronto)  
515 Coldstream Avenue Toronto, ON M6B 2K7  
Charitable Registration # 11896 9344 RR0001